

**County of San Bernardino
Department of Behavioral Health**

Scheduling Application Policy

Effective Date 10/15/08
Approval Date 10/15/08


Allan Rawland, Director

Policy It is the policy of Department of Behavioral Health (DBH) for all DBH outpatient sites that regularly schedule client appointments to utilize the Department's scheduling application to enter all clinic-based services and staff activities.

Purpose For quality client care, efficient site management and administrative review of records, DBH outpatient sites will maintain the availability and schedule information of treatment staff and detailed records of client appointments.

Roles and Responsibilities The following lists the roles and responsibilities of staff and outpatient sites that regularly schedule client appointments for the scheduling application:

Roles	Responsibilities
DBH Outpatient Sites	<ul style="list-style-type: none">• Maintain a prospective site master schedule, as well as a detailed history of client appointments and staff availability• Project treatment staff schedules at least twelve months in advance• Maintain updates of treatment staff schedules every six months• Provide reports to the appropriate Deputy Director and/or Program Manager II, as requested
Clinic Supervisor and/or Supervising Office Specialist	<ul style="list-style-type: none">• Provide Information Technology (IT) with user groups for outpatient site listing designated staff with the appropriate authority levels to access, read, input or delete information in the scheduling application• Provide member changes of the user group to IT

Continued on next page

**County of San Bernardino
Department of Behavioral Health**

Scheduling Application Policy, Continued

Roles and Responsibilities (continued)

Roles	Responsibilities
Information Technology	<ul style="list-style-type: none">• Set up and maintain user group access levels for the scheduling application• Maintain application, database and terminal service (Citrix) server environment• Maintain software and Simon interface operability• Maintain and implement software upgrades• Maintain application and infrastructure licensing requirements• Develop and maintain application reporting requirements• Manage all contractual obligations with the vendor, to include application enhancements
Designated Scheduling Staff	<ul style="list-style-type: none">• Directly schedule and manage appointments for clients with single or multiple providers,• Handle complex scheduling requirements,• Book recurring appointments for clients, as necessary,• Double-book appointment slots with notes, if instructed and approved by treatment staff and/or supervisor,• Assign and delete clients from recurring groups,• Block out times for non-client staff activities as necessary,• Hold time slots for specific appointment types based on treatment staff and supervisor instructions,• Require and track reasons for all appointment cancellations and no-shows,• Manage an automated wait list as needed,• Produce call-reminder lists,• Create detailed reports (files) for local and Departmental review, and• Continue to verify accuracy of information in SIMON.

County of San Bernardino

Department of Behavioral Health

Department Support

Designated scheduling staff at each of the DBH outpatient sites with automated scheduler software is provided training and assistance relative to the services provided, staffing ratios and hours of operation. Designated scheduling staff is provided the [Appointment Centralized Scheduling Guide](#) to assist in the functional use of the scheduling application. Clinic Supervisors of DBH outpatient sites with the scheduling application are provided a [Toolbox of Recommended Forms](#) intended to assist in the establishment and usage of treatment staff schedules.

Questions/ Problems

For questions/problems relating to the functional use of the scheduling application, contact the [Site Super User](#). For technical difficulties regarding the scheduling application or software, contact the DBH Help Desk (909) 884-4884.

**County of San Bernardino
Department of Behavioral Health
Toolbox of Recommended Forms**

Forms

The following are forms available for use by DBH outpatient sites with the scheduling application software:

Form
Scheduling Template
Schedule Change Request
Site Super User Listing

**Appointment
Slips**

DBH outpatient sites that regularly schedule client appointments will continue to use the existing two-part appointment slips.

**County of San Bernardino
Department of Behavioral Health**

Site Super User Listing

Site Super User Site Super Users are personnel working in DBH outpatient sites that utilize the scheduling application that are considered proficient in its use. Site Super Users shall assist designated scheduling staff with difficulties that are not technology related. Designated Scheduling Staff should contact the Site Super User within the same site prior to contacting a Site Super User from another site.

Contacts If you have questions that pertain to completing, editing, deleting an appointment or other functions not related to technical issues for the scheduling application, please contact a Site Super User listed below:

Name	Location	Contact Number
Margaret Hernandez	Phoenix Clinic	909-387-7200
Ildelisa (Hilda) Zapata	Nueva Vida Clinic	909-825-6188

Note: As DBH clinics begin the deployment and utilization of the scheduling application, the Site Super User Listing will be updated.